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This document is divided into four sections; each explaining a different aspect of Clause Logic as it currently exists in PD². The sections are as follows:

PD² Clause Logic – The User's Perspective
PD² Clause Logic – The System Administrator's Perspective
Migration of Clause Templates to Clause Logic
Available PD² Data Criteria

This information is intended to help you understand how Clause Logic works and how it might effect your site. This paper does not replace the formal clause logic training conducted during the PD² courses provided by AMS/DSIC.

PD² Clause Logic – The User's Perspective

1. The central concept of clause logic is the idea that clause rules are used to limit, or focus, the instances when clauses are appropriately included in solicitations and contracts. A clause rule can be created which has no limitations, thus meaning that the rule will always be true and the associated clause will always be selected. A clause rule can be created which has one or more limitations, thus focusing the instances that are appropriate for the associated clause to be included in the document.
2. Basic to all automatic clause selection is the entry of complete and appropriate data by the user. As a minimum, the user should identify one or more product types being procured and an estimated/actual dollar value. Prescriptive language in the FAR and DFARS primarily use these two types of information to define when certain clauses are appropriate for use in solicitation and contract documents. Since the clause logic mirrors regulatory prescriptive language, it should seem obvious that the clause rules are heavily dependent upon user identification of the product type and dollar value of the procurement action.
3. Types of data used to determine clause selection are identified below:
 - a. Data criteria are defined as comparisons against data elements already entered by the user, or calculated from data entered by the user. Data criteria may be entered into fields, selected from drop-down lists, be numerically compared to calculated values such as the total dollar value of line items, extracted from a character string such as the procurement instrument identification number (PIIN), highlighted radio buttons, etc. The user must enter complete and appropriate data into the PD² procurement document prior to running automatic clause selection. Data criteria are automatically used by the system in selecting appropriate clauses.
 - b. Document characteristics are things that may be applicable to an acquisition that is not available as data criteria. In the paper world, many of these things were made part of the document by adding a clause. They are defined by the need for an additional data point not already available elsewhere in the database. The user must use the Document Options. Characteristics menu command to view and select appropriate characteristics.

user can use the Include/Not Include flag on the Clauses tab to identify whether or not recommended clauses are to be included in a document. Additionally, the user may manually add clauses. PD² automatic clause selection takes these into consideration when running clause selection.

4. Data criteria that are used for clause selection include the following types:

- a. Clause logic considers what type of document is being created. To do so, it looks to the PIIN (specifically the letter designating the document type; i.e., the ninth character) to determine what type of solicitation or award the document is. It also looks back to the solicitation to determine what type of solicitation was issued in PD² (or alternatively, the characteristic that defines what type of solicitation was prepared outside of PD²). This is used to determine whether the solicitation was for sealed bid or was negotiated.
- b. Clause logic looks to whether the DPAS field was completed, and if so calls the appropriate DPAS clauses.
- c. Clause logic looks to the contract type selected in line item detail to determine which clauses are appropriate for the particular contract type. Letter contract clauses are pulled if the line item contract type is “Letter” or if the “Letter Contract” characteristic is selected. This allows the user to identify the probable contract type of line item and still identify the contract as being a letter contract and pull in the appropriate clauses.
- d. Identification of inspection and acceptance data allows clause logic to pull the appropriate inspection and acceptance clauses.
- e. Identification of the FOB type on the line item detail Shipment tab allows clause logic to pull the appropriate FOB clause.
- f. Identification of the FSC allows clause logic to pull the appropriate clauses for certain classes of supplies and services. Additionally, identification of the FSCs allows clause logic to filter out possible clauses that are applicable to supplies and services that are not being purchased. It is very important to identify the FSC as correctly as possible, since many of the clause rules use FSC to narrow down the appropriateness of the associated clauses.
- g. Identification of payment type and bond requirements on the line item detail payment tab will pull the appropriate payment and bond clauses.
- h. Identification of the delivery dates in line item detail will pull the associated delivery clauses.
- i. Identification of first article test data in line item detail will pull the appropriate first article test clauses.
- j. Identification of the IDC (indefinite delivery contract) type on line item detail will pull the appropriate IDC clauses.
- k. Selection of the Option radio button or the Option Clauses characteristics will pull the option clauses.
- l. Entry of a HAZMAT code will pull appropriate hazardous materials clauses.

an estimated dollar amount, run automatic clause selection, accept the recommended clauses, delete the dollar values, and then not accept the recommended changes to clauses upon saving.

q. The vendor CAS coverage (full or modified) field in the vendor database is used to identify appropriate cost accounting standards (CAS) clauses for contracts.

r. Data Criteria of “RFP created in PD”, “RFQ created in PD”, and “IFB created in PD” were added to support the change in the clause selection engine addressing a look-back capability to determine what type of solicitation was created in PD². This allowed elimination of “Negotiation” as a characteristic, because it creates the capability of defining negotiation based on the type of solicitation. A similar capability was added to use the IFB to identify clauses required for sealed bid solicitations.

5. Characteristics that are used for clause selection include the following categories:

a. The characteristics listed under Applicable Acts include the Defense Base Act and the Service Contract Act. All other acts are incorporated into the clause logic. Do not be alarmed if you do not see choices for things like the Davis-Bacon Act. They are included in clause logic without user selection of any additional characteristic.

b. The characteristics listed under Competitive Type include Sole Source, Other Than Full and Open, and Two Step Bidding. All other competitive types are incorporated into clause logic. Do not be alarmed if you do not see choices for Competition and Negotiation. They are included in clause logic without user selection of any additional characteristic. For example, if the solicitation created in PD² (or the characteristic for solicitation not in PD²) was identified as an RFP or an RFQ, negotiation is the appropriate competitive type.

c. Characteristics listed under the Other category should be selected as appropriate for the contracting action and will pull in the appropriate clauses for review and selection. For example, when a warranty is to be required, the Warranty characteristic should be selected. When cost and price data is to be required, the Cost and Price characteristic should be selected.

d. Characteristics listed under the Place of Performance include various overseas choices, two specific states (for the state-specific tax clauses), government-owned-contractor-operated facilities, performance on a government installation, and performance in the US. The clause logic data set defaults to performance in the US, so the user need not select US Performance as a characteristic. It is used primarily in the negative sense for some of the clause rules. If the user is at an overseas procurement operation, then the user should always select the appropriate overseas performance characteristic(s).

e. When considering the Product Type characteristics, there are primary and secondary product types.

(1). Each document must have one or more product types identified as Characteristics. Primary product types are general in nature and broadly describe what is being procured. Primary product types include A&E, Construction, Facility, Research and Development, Supply, and Services. Selection of a primary product type will bring in all clauses required for the selected product type. If the product being procured can be more clearly defined by additionally selecting a secondary product type, that characteristic will bring in the additional clauses required by the secondary product type.

f. When choosing the Product Type characteristics, there are several things to consider:

(1) When buying Services, consider the need to also identify Supplies Incidental to Services.

(2) When buying Supplies, consider the need to also identify Services Incidental to Supplies.

(3) When buying services or supplies that are from the commercial market, be sure to also select Commercial Items.

g. Characteristics in the Set-Aside category are used to identify the business category to which the acquisition is being restricted, if any.

h. When a solicitation has not been created in PD², the user should select the solicitation type (IFB, RFP, or RFQ) from the Solicitation Not in PD² category. This identifies to the clause selection engine whether the acquisition is by sealed bid or by negotiation.

6. The clause logic data set (1,600 plus rules for FAR and DFARS clauses) has been developed with certain defaults, as follows:

a. The clause logic assumes that Simplified Acquisition Process is used for acquisitions under the Simplified Acquisition Threshold, or under \$5,000,000 for commercial items. Under these thresholds, if the user desires to use other than the Simplified Acquisition Process, then the user must select the Non-SAP characteristic.

b. The logic assumes that the acquisition is competitive, unless the data or user selection of conflicting characteristics indicates otherwise.

c. The logic assumes that negotiation is being used if the PD² solicitation is an RFP or RFQ, or the user selects the matching characteristic for a solicitation created outside of the PD² database.

d. The logic assumes place of performance is in the United States unless the user selects the Overseas, Guam, United Kingdom, Germany, Italy, or Spain characteristic.

e. Except for the Service Contract Act and the Defense Base Act, applicability of all other Acts have been embedded in the clause logic. If the Service Contract Act or the Defense Base Act apply, the user must select the appropriate characteristic.

f. The Simplified Acquisition Threshold is stored as a separate data element; those clause rules that contain SAT look to that data element. If the SAT changes, the rules will not have to be updated. The clause rules that contain \$100,000 (as specifically defined in the regulations) will remain at the \$100,000 level until the rule itself is changed.

7. After automatic clause selection has been run and the recommended clauses pulled into the clauses tab, the user should review the identified clauses. The user will note that clauses are identified as "Included" or "Not Included". The Include/Not Include flag is determined in system administration and is used to identify the initial setting. In

maintain integrity between the data in the document and the clauses selected for inclusion in the document. Therefore, any changes to data, to include marking clauses on the Clauses tab as Included or Not Included, may have an impact on the appropriate selection of clauses. When the user Saves or Exits the document, clause selection will be run again. Any changes to selected clauses will be recommended as Add or Delete in the Select Clauses window. The user should then accept or decline the recommended changes and save the document.

9. Effective 14 April 1999, a Class Deviation (DAR Tracking Number 98-O0013) was approved allowing all DoD contracting activities using SPS clause logic to deviate from the requirements to use the clauses at FAR 52.212-5 and DFARS 252.212-7001. Clauses 52.212-5 (Dev) and 252.212-7001 (Dev) and appropriate clause logic supporting the deviation clauses have been provided in the 4.1a release of PD². The deviation clauses are similar to the basic clauses, but have the user selectable clauses deleted. Standard clause logic will automatically select the appropriate clauses for inclusion by reference.

PD2 Clause Logic – The System Administrator’s Perspective

1. The central concept of clause logic is the idea that clause rules are used to limit, or focus, the instances when clauses are appropriately included in solicitations and contracts. A clause rule can be created which has no limitations, thus meaning that the rule will always be true and the associated clause will always be selected. A clause rule can be created which has one or more limitations, thus focusing the instances that are appropriate for the associated clause to be included in the document.

2. When a clause rule is created, it includes various limitations (described below) that can be thought of as existing in three states: present, not present, and indifferent.

a. If the limitation is to be “present”, it is a very specific state.

(1) Example 1: If the limitation is an “FFP” line item, the line item must be FFP for the limitation to be true. It cannot be any other type of line item. It can only be the exactly defined limitation.

(2) Example 2: If the limitation is that the total dollar value is to be “>\$100,000”, the total dollar value may be any value in excess of \$100,000. It cannot be less than or equal to that value.

(3) Example 3: If the limitation is that the total dollar value is to be between two dollar values, multiple limitations may be defined. If the limitation is to be a total dollar value between \$100,000 and \$500,000, the limitations may be defined as “>\$100,000” and “<\$500,000”. Any dollar value between the two values will meet the limitation; any dollar value outside of the range fails to meet the limitation. (NOTE: When using multiple quantity limitations, the system administrator should ensure that impossible limitations are not defined. For example, a dollar value cannot be greater than \$500,000 and less than \$100,000 at the same time.)

b. If the limitation is to be “not present”, it is a less specific state.

(1) Example 1: If the limitation is a “Not FFP” line item, the line item can be any type except FFP for the limitation to be true. It can be anything other than the exactly defined limitation. Use of multiple “not present” limitations allows definition of a set of true data.

(2) Example 2: If the limitation is to be any fixed price line item, the limitations can be defined as “Not COST”, “Not CPAF”, “Not CPIF”, “Not CPIF”, “Not CS”, “Not LH”, “Not LTR”, and “Not T&M”. This means that the limitation is defined as being any fixed price line item type.

c. If no limitation is identified, the system is “indifferent” to the state of the data.

(1) Example 1: If no line item type limitation is identified, then any line item type may be selected, and the limitation is still true.

(2) Example 2: If no limitation on the type of document is identified, the rule will be true for all document types.

3. Understanding automatic clause selection and the associated clause logic set requires an understanding of four

(2) Clause Title – used to identify the clause using a name (i.e., Certificate Of Independent Price Determination).

(3) Regulation – used to identify the source of the clause (i.e., FAR, DFARS, Local, etc.)

(4) Effective Date – used to identify the effective date of the clause (documents cannot pull in clauses that have effective dates in the future).

(5) Reserve Date – used to identify the reserve date of the clause (documents cannot pull in clauses that have been reserved prior to the date identified; reserve dates may be identified for future reservation).

(6) Substantially the same as – identifies clauses whose text may be changed by the user; allows the user to open the clause in a read/write status from the clauses tab of line item detail.

(7) Fill-in – identifies clauses with data to be filled in by the user; allows the user to open the clause in a read/write status from the clauses tab of line item detail.

(8) Notify on Change – identifies whether users with unreleased solicitations containing the clause are to be automatically notified when the clause is revised.

(9) User Editable – identifies whether users have the authority to change the clause from full-text to by reference (and vice versa) or to delete the clause using the delete or include/not include function (clauses identified as Required cannot be deleted, nor can the clause inclusion settings be modified by the user).

(10) Usage Text – identifies the appropriate conditions for use of the clause.

(11) Clause text – identifies the text of the clause.

b. Associate clause rule(s) with clauses

c. Define whether the clause should pull in by full text or by reference, whether the clause is required, required when applicable or optional. Clauses identified as Required cannot be deleted or marked as Not Included by the user. Clause identification as Required When Applicable or Optional is informational only; these settings have no impact on clause usage.

d. Specify in which section of various formats the clause is to be placed.

5. Clause Rules can be defined using a combination of data criteria, document characteristics, imbedded routines, and clause inclusion. These are used to define the clause applicability limitations defined above. The clause rule is used to define when it is appropriate for the associated clause to be automatically included into, or recommended to, the procurement document. Another way to think of the rule, is that it restricts when the rule can be called. A rule that has no data criteria, characteristics, or embedded routines (SQL statements) has no limitations. Therefore, the rule will always be true; any clause with which it is associated will be pulled into all procurement documents. Adding data criteria, characteristics, or embedded routines to the rule adds restrictions on when the rule can be true, and therefore when the clause will be pulled into the document. Sources of data that can be used

c. SQL statements (embedded routines) are look-up routines that look for certain items in the database. The only one in the system currently looks back through the chain of documents to ascertain if a DD254 is associated with the procurement action.

d. Clause inclusion is used to identify other clauses which must be present or absent for a specified clause to be defined as being applicable. For example, when the regulation prescriptive language states that Clause X is used when Clause Y or Clause Z are used, then Clause Y or Z being present can be defined in the clause rule. Alternatively, if Clause A is to be used when Clause B is not used, then the Clause A rule can include the requirement that Clause B is not present.

6. Characteristics that are required by the system administrator to provide an additional data point for the purposes of defining clause rules may be created, deleted or modified using the Chars (Characteristics) task in System Administration. Those SPS provided characteristics starting with “PD2” are part of the standard data set and cannot be changed or deleted by the system administrator, however, they may be used by the system administrator in creating additional rules for local clauses. It is recommended that a system administrator who desires to create additional characteristics use a naming convention different than the SPS provided characteristics. For example, an Air Force site may begin their locally defined characteristics with “AF”. Categories are used to create groupings of characteristics. Categories cannot be used in clause logic, but assist the system administrator in grouping like characteristics for ease of use.

7. The Format task is used for two primary purposes; 1) to define the document format, including the sections and content of those sections, which will be used to generate the procurement documents, and 2) to associate appropriate procurement documents (as default, or as available) which may use the defined formats. It is important to understand that every clause that is to be pulled into a document must have one or more format sections assigned to the clause. This defines where the clause will be generated into the document. PD² uses the assigned UCF section (in the Clause task) to identify Provisions. It is important to assign an appropriate UCF section to Local clauses, even if the clause will not be used in UCF documents. This is how PD² identifies the Provisions and a) removes them from an award being created from a solicitation, and b) prevents them from being added to a stand-alone award.

8. A useful way to understand how automatic clause selection operates and is set up is to use the paradigm of When, What, How, Where.

a. The When is defined by the clause rule. When the clause rule (all of its parts) is true, the associated clause will be appropriate for inclusion in the procurement document, or for presentation to the user for consideration (i.e., in a Not Include status).

b. The What is defined by the association of one or more rules to a clause. What clause is to be selected When its selection is appropriate based on data entered into the document and characteristics that have been selected.

c. The How is defined after the clause rule is associated with a clause and defines How the clause is to be pulled into the document (i.e., by full text or by reference; as required, required when applicable, or optional; initially as included or not included).

- a. The clause logic assumes that Simplified Acquisition Process is used for acquisitions under the Simplified Acquisition Threshold, or under \$5,000,000 for commercial items. Under these thresholds, if other than the Simplified Acquisition Process is to be used, then the Non-SAP characteristic must be selected.
- b. The logic assumes that the acquisition is competitive, unless the data or user selection of conflicting characteristics indicates otherwise.
- c. The logic assumes that negotiation is being used if the PD solicitation is an RFP or RFQ, or the user selects the matching characteristic for a solicitation created outside of the PD² database.
- d. The logic assumes place of performance is in the United States unless the user selects the Overseas, Guam, United Kingdom, Germany, Italy, or Spain characteristic.
- e. Except for the Service Contract Act and the Defense Base Act, applicability of all other Acts have been embedded in the clause logic. If the Service Contract Act or the Defense Base Act apply, the appropriate characteristic must be selected.
- f. The Simplified Acquisition Threshold is stored as a separate data element; those clause rules that contain SAT look to that data element. If the SAT changes, the rules will not have to be updated. The clause rules that contain \$100,000 (as specifically defined in the regulations) will remain at the \$100,000 level until the rule itself is changed.

10. Data criteria, characteristics, and clause rules that begin with “PD2” are not editable, nor may they be deleted by the local system administrator. This protects the integrity of the provided clause logic and data.

11. Examples:

- a. New Clause Logic using existing data criteria and characteristics for Local Clauses.

(1) A local clause is loaded into the clause database that should be included in solicitations and contracts over the simplified acquisition threshold for all acquisitions for supplies when FAR 52.209-1 or 52.211-5 are used. The system administrator opens the System Administration, Clause Rule task and clicks the New button. On the Rule tab, the system administrator enters a name not starting with “PD2”, for example AFMC 1234. The rule name should be such that the system administrator can easily identify the clause that the rule will be associated with or the circumstances under which the rule will be true. On the Data Criteria tab, the system administrator selects the “PD2 CON, IFB, RFP, RFQ” data criteria to indicate that the rule is applicable to documents that are a contract, IFB, RFP, or RFQ. (NOTE: If the rule is to be applicable to all document types, no document-type data criteria needs to be selected; the system will be indifferent to which type of document is being used.) The system administrator will also select “PD2 > Simplified Acquisition Threshold” criteria to indicate that the rule is applicable when the total of line item dollar values is greater than the simplified acquisition threshold. On the Characteristic tab, the system administrator opens the Product Type category and selects the Supply characteristic to indicate that the rule is applicable to the purchase of supplies. On the Clause Inclusion tab, the system administrator clicks the Add Clause button and uses the search utility to select 52.209-1 and 52.211-5 from the list of available clauses. The system administrator then selects the “Or” radio button from the Condition block. and

(4) The system administrator opens the System Administration, Clause task and uses the search utility to find the applicable local clause, in this case AFMC 1234. The system administrator highlights the clause and Clicks the “Revise” button. The system administrator either sets or verifies the effective date of the clause and clicks the “OK” button. The system administrator verifies or edits information on the Clause tab. On the Rule tab, the system administrator uses the search utility to find the appropriate clause rule or rules, in this case, clause AFMC 1234. The system administrator highlights rule AFMC 1234 and moves it to the Selected Rules window using the down arrow. The system administrator selects the appropriate Required, Incorporation, and Not Include status. On the Section tab, the system administrator identifies the appropriate format section(s) that the clause should be inserted into by highlighting the section(s) and moving them into the Selected Sections window using the down arrow.

(5) The clause will now be inserted into the section identified by the system administrator for the format selected by the user in the Required, Incorporation, and Not Include status selected by the system administrator when all parts of the clause rule are true.

b. Creating a new Data Criteria

(1) Data criteria can be created that looks at data items from drop down lists, numerical fields, text fields, whether a field is filled in, and may use wild-card values to look at “classes” of data. If the system administrator needs to define a data criteria not already in the list of available PD2 data criteria, this is done through the System Administration, Clause Rule task.

(2) In this example, the system administrator finds a need for a data criteria for the purchase of Live Animals (Federal Supply Group 88)(available from a drop-down list). On the Data Criteria tab, the user clicks the “New” button. In the Data Criteria Detail screen, the system administrator enters a description of the data criteria, for example, “AFMC Live Animals”. The “AFMC” is used to specify that the data criteria is not one of the PD2 criteria, but has been created by the organization. The system administrator selects the appropriate source of the data from the Data Source drop down, in this case, “PD2 CLIN” since the FSC is entered in line item detail. The system administrator selects the appropriate data attribute, in this case “PD2 FSC Group”. The system administrator selects the appropriate operator, in this case “=”, because the data criteria is to be equal to FSG 88. The system administrator clicks the “Add” button to enter the Data Value Detail. Using the drop down list, the system administrator selects “88” and clicks the “OK” button. The selected data value will appear in the Data Value window. The system administrator clicks the “OK” button to save the newly created data criteria.

(3) In a second example, the system administrator finds a need for a data criteria for procurement actions over \$123,000. On the Data Criteria tab, the user clicks the “New” button. In the Data Criteria Detail screen, the system administrator enters a description of the data criteria, for example, “AFMC Over \$123,000”. The “AFMC” is used to specify that the data criteria is not one of the PD2 criteria, but has been created by the organization. The system administrator selects the appropriate source of the data from the Data Source drop down, in this case, “PD2 Total Cost”. The system administrator selects the appropriate data attribute, in this case “PD2 Total Cost”. The system administrator selects the appropriate operator, in this case “>”, because the data criteria is to be greater than the defined value. The system administrator clicks the “Add” button to enter the Data Value Detail. The system administrator enters “123000” in the Data Value field and clicks the “OK” button. The entered data value will appear in the Data Value window. (NOTE: When entering numerical values. use only number: do not use

means that the field is not empty (therefore has data entered in the field). No additional information is required for definition of this data criteria. The system administrator clicks the “OK” button to save the newly created data criteria.

(5) In a fourth example, the system administrator finds a need for a data criteria to determine if the Additional Shipping Marking started with the phrase “Mark For”. On the Data Criteria tab, the user clicks the “New” button. In the Data Criteria Detail screen, the system administrator enters a description of the data criteria, for example, “AFMC Mark For”. The “AFMC” is used to specify that the data criteria is not one of the PD2 criteria, but has been created by the organization. The system administrator selects the appropriate source of the data from the Data Source drop down, in this case, “PD2 CLIN”, since the Additional Shipping Marking field is in line item detail. The system administrator selects the appropriate data attribute, in this case “PD2 Additional Shipping Marking”. The system administrator selects the appropriate operator, in this case “LIKE”, because the data criteria will be used with a wild-card to determine if the entered value meets the defined criteria. The system administrator clicks the “Add” button to enter the Data Value Detail. The system administrator enters “Mark For%” in the Data Value field and clicks the “OK” button. The percent sign (%) is the wild card and will cause the data criteria to look for data starting with “Mark For” and will be indifferent to additional characters in the entered data. The entered data value will appear in the Data Value window. The system administrator clicks the “OK” button to save the newly created data criteria.

c. Creating a new Characteristic

(1) If the system administrator needs to define a characteristic not already in the list of available PD2 data criteria, this is done through the System Administration, Chars task. On the Characteristics tab, the user clicks the “New” button. In this example, the system administrator finds a need for a characteristic for the purchase of Non-Appropriated Fund (NAF) items. In the Characteristic Detail screen, the system administrator uses the Category drop down list to select the appropriate Category within which the characteristic will be stored, in this case, “Other”. The system administrator enters a name for the characteristic in the Name field, for example, “AFMC NAF”. The “AFMC” is used to specify that the characteristic is not one of the PD2 characteristics, but has been created by the organization. The system administrator enters a description of the characteristic, in this case, “AFMC Non-Appropriated Funds”. The system administrator clicks the “OK” button to save the newly created characteristic.

d. New Clause Logic using locally created data criteria and characteristics for Local Clauses

(1) A local clause is loaded into the clause database that should be included in solicitations and contracts for acquisition of live animals using non-appropriated funds. The system administrator opens the System Administration, Clause Rule task and clicks the New button. On the Rule tab, the system administrator enters a name not starting with “PD2”, for example AFMC NAF Animals. The rule name should be such that the system administrator can easily identify the clause that the rule will be associated with or the circumstances under which the rule will be true. On the Data Criteria tab, the system administrator selects the “PD2 CON, IFB, RFP, RFQ” data criteria to indicate that the rule is applicable to documents that are a contract, IFB, RFP, or RFQ. The system administrator will also select “AFMC Live Animals” criteria to indicate that the rule is applicable when any FSC in the Federal Supply Group 88 is entered into line item detail in the FSC field. On the Characteristic tab, the system administrator opens the Other category and selects the AFMC NAF characteristic to indicate that the rule is

clicks the “OK” button. The system administrator verifies or edits information on the Clause tab. On the Rule tab, the system administrator uses the search utility to find the appropriate clause rule or rules, in this case, clause AFMC NAF Animals. The system administrator highlights rule AFMC NAF Animals and moves it to the Selected Rules window using the down arrow. The system administrator selects the appropriate Required, Incorporation, and Not Include status. On the Section tab, the system administrator identifies the appropriate format section(s) that the clause should be inserted into by highlighting the section(s) and moving them into the Selected Sections window using the down arrow.

(5) The clause will now be inserted into the section identified by the system administrator for the format selected by the user in the Required, Incorporation, and Not Include status selected by the system administrator when all parts of the clause rule are true.

e. Replacement Clause Logic for PD2 Clause Rules

(1) If a system administrator determines that the provided PD2 clause rule does not meet the organization’s requirements, the system administrator may create a new local rule and replace the PD2 rule with that local rule. To do this, the system administrator creates a new local rule as described above, dissociates the PD² rule, associates the local rule with the clause, defines how the clause is to appear in the document, and assigns/reassigns appropriate format sections.

(2) When changes to the FAR or DFARS require changes to a PD² rule, the database update installer (downloaded from the AMS SPS web-site) will update the PD² rule and will re-associate the rule with the clause. The system administrator must review the decision to use or not use the provided PD² rule. If a rule does not change, the dissociated rule will not be re-associated. The database update installer will not change local clauses or clause rules. If a PD² data criteria or characteristic is changed, the system administrator will be advised of the change prior to running the database update installer so that local clause rules that include the changed data criteria or characteristic can be appropriately modified.

12. Effective 14 April 1999, a Class Deviation (DAR Tracking Number 98-O0013) was approved allowing all DoD contracting activities using SPS clause logic to deviate from the requirements to use the clauses at FAR 52.212-5 and DFARS 252.212-7001. Clauses 52.212-5 (Dev) and 252.212-7001 (Dev) and appropriate clause logic supporting the deviation clauses have been provided in the 4.1a release of PD². The deviation clauses are similar to the basic clauses, but have the user selectable clauses deleted. Standard clause logic will automatically select the appropriate clauses for inclusion by reference.

Migration of Clause Templates to Clause Logic

Scenario 1: User site has PD² version 3.5.3 installed with clause templates created and upgrade is to PD² version 4.0.

1. The installer will create a local characteristic for each existing clause template and optional group.
2. The new local characteristics will have the same name as the template or group.
3. The new local characteristics will be stored in the Clause Template and Optional Group category as appropriate.
4. A new local clause rule will be created for each new characteristic that will contain only the new local characteristic.
5. The new local clause rule will have the same name as the template or group.
6. The new local clause rule will be associated with all clauses that were in the clause template or optional group.
7. The clause will have the same inclusion status (Required/Required When Applicable/Optional, By Reference/Full Text, and Include/Not Include) and format section (UCF section, CSI section, 1449, and MCM) as in the clause template or optional group.
8. To add clauses to the original “template”, the system administrator can use the system administration Clause task to:
 - a. associate the local rule the desired clause(s),
 - b. define the inclusion status, and
 - c. identify the appropriate format section(s).
9. To delete clauses from the original “template”, the system administrator can use the system administration Clause task to dissociate the local rule from the clause(s).
10. If the user creates a document and selects the local characteristic, the local rule will be true, and all clauses with the associated rule will be included into the document.
11. No PD² clause logic is provided for FAR/DFARS clauses.

Scenario 2: User site has PD² version 3.5.3 installed with clause templates created and upgrade is to PD² version 4.1.

1. The installer will create a local characteristic for each existing clause template and optional group.

7. The clause will have the same inclusion status and format section as in the clause template or optional group.
8. To add clauses to the original “template”, the system administrator can use the system administration Clause task to:
 - a. associate the local rule the desired clause(s),
 - b. define the inclusion status (Required/Required When Applicable/Optional, By Reference/Full Text, and Include/Not Include), and
 - c. identify the appropriate format section(s) (UCF section, CSI section, 1449, and MCM).
9. To delete clauses from the original “template”, the system administrator can use the system administration Clause task to dissociate the local rule from the clause(s).
10. If the user creates a document and selects the local characteristic, the local rule will be true, and all clauses with the associated rule will be included into the document.
11. PD² clause logic through 15 July 1998 (as accepted by the SPS Program Office) is provided for FAR/DFARS clauses.
12. Therefore, additional clauses may also be called into the document based on other data entered into the document.

Scenario 3: User site has PD² version 3.5.3 installed with clause templates created and upgrade is to PD² version 4.1a (or later).

1. The installer will create a local characteristic for each existing clause template and optional group.
2. The new local characteristics will have the same name as the template or group.
3. The new local characteristics will be stored in the Clause Template and Optional Group category as appropriate.
4. A new local clause rule will be created for each new characteristic that will contain only the new local characteristic.
5. The new local clause rule will have the same name as the template or group.
6. The new local clause rule will be associated with all clauses that were in the clause template or optional group.
7. The clause will have the same inclusion status and format section as in the clause template or optional group.
8. To add clauses to the original “template”, the system administrator can use the system administration Clause

9. To delete clauses from the original “template”, the system administrator can use the system administration Clause task to dissociate the local rule from the clause(s).

10. If the user creates a document and selects the local characteristic, the local rule will be true, and all clauses with the associated rule will be included into the document.

11. PD² clause logic through 7 days prior to version 4.1a acceptance (probably 4 March 1999) (as accepted by the SPS Program Office) is provided for FAR/DFARS clauses.

12. Therefore, additional clauses may also be called into the document based on other data entered into the document.

Scenario 4: User site is getting a new installation of PD² version 4.0.

1. The system administrator may use the system administration Characteristics task to create additional local characteristics and/or categories as desired.

2. The system administrator may use the system administration Clause Rule task to create desired local clause rules using local characteristics.

3. The system administrator may use the system administration Clause task to:

a. associate the local clause rules with desired clauses,

b. define the inclusion status (Required/Required When Applicable/Optional, By Reference/Full Text, and Include/Not Include), and

c. identify the appropriate format section(s) (UCF section, CSI section, 1449, and MCM).

4. If the user creates a document and selects the local characteristic, the local rule will be true, and all clauses with the associated rule will be included into the document.

5. No PD² clause logic is provided for FAR/DFARS clauses.

Scenario 5: User site is getting a new installation of PD² version 4.1.

1. The system administrator may use the system administration Characteristics task to create additional local characteristics and/or categories as desired.

2. The system administrator may use the system administration Clause Rule task to create desired local clause rules using local characteristics, or provided data criteria, characteristics, and SQL statements.

3. The system administrator may use the system administration Clause task to:

5. PD² clause logic through 15 July 1998 (as accepted by the SPS Program Office) is provided for FAR/DFARS clauses.

6. Therefore, additional clauses may also be called into the document based on other data entered into the document.

Scenario 6: User site is getting a new installation of PD² version 4.1a (or later).

1. The system administrator may use the system administration Characteristics task to create additional local characteristics and/or categories as desired.

2. The system administrator may use the system administration Clause Rule task to create desired local clause rules using local characteristics, or provided data criteria, characteristics, and SQL statements.

3. The system administrator may use the system administration Clause task to:

a. associate the local clause rules with desired clauses,

b. define the inclusion status (Required/Required When Applicable/Optional, By Reference/Full Text, and Include/Not Include), and

c. identify the appropriate format section(s) (UCF section, CSI section, 1449, and MCM).

4. If the user creates a document and selects the local characteristic, the local rule will be true, and all clauses with the associated rule will be included into the document.

5. PD² clause logic through 7 days prior to version 4.1a acceptance (probably 4 March 1999) (as accepted by the SPS Program Office) is provided for FAR/DFARS clauses.

6. Therefore, additional clauses may also be called into the document based on other data entered into the document.

NOTE: Detailed instructions on the use of system administration Characteristics, Clause Rule, and Clause tasks are available in the version 4.0 or later user/system administration manuals.

Available PD² Data Criteria

NOTE: This list of data criteria, characteristics, and SQLs are current as of 6 April 99, and are subject to change at any time based on new clause logic requirements.

Vendor CAS Code

- Full CAS

- Modified CAS

- Not Modified CAS

Acceptance Terms By

- Acceptance By Contractor

- Acceptance By Government

Acceptance Terms Location

- Acceptance At Contractor

- Acceptance At Government

Bond Type

- Both Payment and Performance Bonds

- No Bonds

- Payment Bond Only

- Performance Bond Only

Contract Type

- Cost

- CPAF (Cost Plus Award Fee)

- CPFF (Cost Plus Fixed Fee)

- CPIF (Cost Plus Incentive Fee)

- CS (Cost Sharing)

- FCP-RPD (Fixed Ceiling Price – Retroactive Price Determination)

- FFP (Firm Fixed Price)

- FFP-LOE (Firm Fixed Price – Level of Effort)

- FP-EPA (Fixed Price – Economic Price Adjustment)

- FPI (Fixed Price Incentive)

- FP-PPR (Fixed Price – Prospective Price Redetermination)

- Labor Hour

- Letter

- Time & Materials

- Not Cost

- Not CPAF (Cost Plus Award Fee)

- Not CPFF (Cost Plus Fixed Fee)

- Not CPIF (Cost Plus Incentive Fee)

- Not CS (Cost Sharing)

- Not FCP-RPD (Fixed Ceiling Price – Retroactive Price Determination)

- Not FFP (Firm Fixed Price)

Delivery Date Specified
Delivery Period
ADC (After Date of Contract) Delivery
FOB
C&F Destination
CIF Destination
FAS Vessel
FOB Air Terminal POE
FOB Air Terminal POI
Destination
Destination Consignees Premises
FOB Ex Dock
FOB Inland Carrier
FOB Inland Point
FOB Origin
FOB Origin Contractor's Facility
FOB Origin Freight Allowed
FOB Origin Freight Prepaid
FOB Origin with Differentials
FOB Vessel
Not C&F Destination
Not CIF Destination
Not FAS Vessel
Not FOB Air Terminal POE
Not FOB Air Terminal POI
Not Destination
Not Destination Consignees Premises
Not FOB Ex Dock
Not FOB Inland Carrier
Not FOB Inland Point
Not FOB Origin
Not FOB Origin Contractor's Facility
Not FOB Origin Freight Allowed
Not FOB Origin Freight Prepaid
Not FOB Origin with Differentials
Not FOB Vessel
FSC Code
Audit Services (FSC R704)
Bakery (FSC 8920)
Dairy (FSC 8910)
European Union FSCs
FSC 5920
FSC 6830
FSC 9515

Not FSC 8810
Not FSC 8905
Not FSC 8910
Not FSC 8915
Not FSC 8920
Not FSC J019
Not FSC Y216
Not FSC Z216
Not FSC Mortuary Services (FSC G001)
Not Personal Services (FSC R497)
Not Refuse Services (FSC S205)
Personal Services (FSC R497)
Refuse Services (FSC S205)
Stevedoring Services (FSC V114)

FSC Group

Ammunition and Explosives (FSG 13)
European Union FSGs
FSG 14, 15, or 18
FSG 15
FSG 15, 16, or 17
FSG 15, 16, or 18
FSG 19, or 20
FSG 20
FSG 20 or 40
FSG 51 or 52
FSG 70
FSG 91
FSG Q
FSG W
Information Technology (FSG 70 or 74)
Not FSG 91
Not Subsistence (FSG 89)
Subsistence (FSG 89)

HAZMAT Requirements

HAZMAT Requirements

IDC Type

IDDQ (Indefinite Delivery Definite Quantity)
IDIQ (Indefinite Delivery Indefinite Quantity)
Requirements
Not Requirements

Inspection Terms By

Inspection By Contractor
Inspection By Government

Inspection Terms Location

Progress Payment
Performance of Test (First Article Test or Production Lot Test)
Contractor Activity
Government Activity
Government and Contractor Activity
Period of Performance Start Date
Period of Performance Start Date Specified
Program Code
Program Code A20
Progress Payment Type
Progress Payment – Cost Based
SIC (Standard Industry Code)
DoD Targeted Industry Categories
SIC 15 – 17 Series
SIC 3731
SIC 4212 or 4953
SIC 7389, 8711, 8712, or 8713
Test Type
First Article Test
Variation in Quantity
Variation in Quantity (+)
Variation in Quantity (-)
FMS Case
FMS
Document Format Name
UCF
Not UCF
Document Number (CON – Contract, IFB – Invitation for Bids, RFP – Request for Proposals, RFQ – Request for Quotes, PO – Purchase Order)
CON
CON or IFB
CON, IFB or PO
CON, IFB, PO or RFP
CON, IFB, PO or RFQ
CON, IFB or RFP
CON, IFB, RFP or RFQ
CON, IFB or RFQ
CON or PO
CON, PO or RFP
CON, PO, RFP or RFQ
CON, PO or RFQ
CON or RFP
CON, RFP or RFQ
CON or RFO

PO or RFP
PO, RFP or RFQ
PO or RFQ
RFP
RFP or RFQ
RFQ

DPAS (Defense Priorities and Allocations System)
DPAS Entered

EFT

EFT (Electronic Funds Transfer) Payment

Purchase Order Type

Bilateral
Not Bilateral
Not Unilateral
Unilateral

Solicitation to Award – Solicitation Document Number

Award from PD2 IFB
Award from PD2 RFP
Award from PD2 RFQ

Total Cost (Sum of Line Item Price/Cost)

< \$1,000,000
< \$186,000
< \$25,000
< \$5,000,000
< \$53,150
< \$7,143,000
< \$7,311,000
< Simplified Acquisition Threshold
<= \$10,000,000
<= \$100,000
<= \$25,000,000
<= \$50,000
<= \$500,000
<= Micropurchase Threshold
<= Simplified Acquisition Threshold
>Micropurchase Threshold
> Simplified Acquisition Threshold
>= \$1,000,000
>= \$10,000
>= \$10,000,000
>= \$100,000
>= \$190,000
>= \$2,000
>= \$2.500

Available PD² Characteristics

Applicable Acts

- Defense Base Act
- Service Contract Act

Competitive Types

- Other Than Full and Open
- Sole Source
- Two Step Bidding

Other

- Non-Profits
- Office Relocation
- EVMS (Earned Value Management System)
- A-76 (Contracting Out)
- Government Agency, State or Local Government, Foreign Government or Agency
- Handling of Ammunition and Explosives
- Closing Military Installations
- Records on Individuals
- Non-SAP (Other Than Simplified Acquisition Procedures)
- Shop/Record Drawings
- Higher Education
- Production Progress Reports
- Advisory and Assistance Services
- Patents
- ECP (Engineering Change Proposals)
- Bid Samples
- Annual Representations and Certifications
- Bill of Lading
- Value Engineering
- Cost/Schedule Status Report
- Contracting Officer's Representative
- GFP (Government Furnished Property)
- Rights/Technical Data
- Export of Supplies
- System Acquisition
- Bid Guarantee
- Indemnification
- UCAs (Un definitized Contract Actions)
- Specialty Metals
- Cost and Price Data
- Incremental Funding
- Royalties
- Warranty
- Personal Property/Household Goods

North Carolina
New Mexico
Italy
United States
United Kingdom
Spain
Guam
Government Installation (DoD, Government, or Federal Installation)

Product Type

R&D (Research and Development)
A&E (Architect and Engineering)
Facility
Modification and Repair
Leasing of Motor Vehicles
Utilities
DDRI (Dismantling, Demolition, and Removal of Improvements)
Transportation
Supply
Supplies Incidental to Services
Subscriptions
Construction
Services
Services Incidental to Supplies
Communication Services
Commercial Items

Set-Aside Program

Evaluation Preference for SDB (Small Disadvantaged Business)
HUBZONE (Historically Underutilized Business Zone) Set-Aside
HBCU/MI (Historically Black Colleges and Universities/Minority Institutions)
Very Small Business Set-Aside
8(a) Set-Aside Under the 6 May 98 MOU (Memorandum of Understanding)
SDB (Small Disadvantaged Business) Set-Aside
SBIR (Small Business Innovative Research) Program
SB (Small Business) Set-Aside
8(a) Set-Aside

Solicitation Not in PD2

Award From IFB Not In PD2c
Award From RFP Not In PD2
Award From RFQ Not In PD2

Available PD² SQL Statements

Check for DD 254 in PD2